February 09, 2016

ADOPTED

BOARD OF SUPERVISORS
COUNTY OF LOS ANGELES

33   February 9, 2016

PATRICK OGAWA
ACTING EXECUTIVE OFFICER

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, California 90012

Dear Supervisors:

APPROVAL TO AMEND A SOLE SOURCE HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE, AND MAINTENANCE SERVICE CONTRACT WITH AUTOMATED CASE MANAGEMENT SYSTEMS, INC. EFFECTIVE MARCH 1, 2016 THROUGH FEBRUARY 28, 2019 (ALL SUPERVISORIAL DISTRICTS) (3 VOTES)

CIO RECOMMENDATION: APPROVE (X) APPROVE WITH MODIFICATION ( ) DISAPPROVE ( )

SUBJECT

Request approval to execute a sole-source contract amendment for the provision of HIV/AIDS data management, training, systems license, and maintenance services with Automated Case Management Systems, Inc. and delegated authority to execute future amendments.

IT IS RECOMMENDED THAT THE BOARD:

1. Authorize and instruct the Interim Director of the Department of Public Health (DPH), or her designee, to execute a sole-source contract amendment, substantially similar to Exhibit I, with Automated Case Management Systems, Inc. (ACMS), Contract Number H204251, for the provision of HIV/AIDS data management, training, systems license, and maintenance services (Data Management), to extend the contract term for three additional 12-month periods at an annual maximum obligation of $660,000 effective March 1, 2016 through February 28, 2019, 100 percent offset by Ryan White Program (RWP) Part A funds.

2. Delegate authority to the Interim Director of DPH, or her designee, to execute amendments to the contract that extend the term through February 29, 2020 at the annual amount of $660,000; adjust

the term through August 31, 2020; allow the rollover of unspent contract funds; and/or provide an increase or decrease in funding up to 10 percent above or below each term's annual base maximum obligation, effective upon amendment execution or at the beginning of the applicable contract term, and make corresponding service adjustments, as necessary, subject to review and approval by County Counsel and the Chief Information Office (CIO), and notification to your Board and the Chief Executive Office.

3. Delegate authority to the Interim Director of DPH, or her designee, to execute change notices to the contract that authorize modifications to or within budget categories, and corresponding service adjustments, as necessary; changes to hours of operation and/or service locations; and/or corrections of errors in the contract's terms and conditions.

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

Approval of Recommendation 1 will allow DPH to extend the term of the contract with ACMS to continue to accurately and consistently report required client-level care data to State and federal funders, including the California Department of Public Health, Office of AIDS and the Health Resources Services Administration (HRSA), the federal funder for the RWP. ACMS' Casewatch data system is the data management system for the DPH Division of HIV and STD Programs (DHSP)-funded HIV care services providers. DPH is currently completing a needs assessment to assess what system could potentially replace Casewatch and other similar disease reporting and client-level case management data systems in use throughout the County. This assessment is expected to be completed in 2016 and the results will be used to develop a competitive bid for data systems services. DPH is requesting a three-year extension through February 28, 2019 and delegated authority for a one-time 12-month extension through February 29, 2020 to allow sufficient time for the assessment to be completed, appropriate County review, development of a solicitation, successful award through a competitive bid process, and a significant client-level data system transition period.

In 2012, DPH invested a significant amount of resources to build a billing module within Casewatch for HIV medical, laboratory, pharmacy, and radiology reimbursements. If the sole source contract is not extended, DPH would need to identify an alternative billing system for RWP-related expenditures. This system would need to be in place and fully functional before the ACMS contract terminates, or DPH could face federal sanctions up to and including elimination of federal funding to Los Angeles County. At this time, Casewatch is the only system available that can provide reimbursement to DHSP's fee-for-service HIV care contracts and also meet the federal data reporting requirements.

Approval of Recommendation 2 will allow DPH to execute amendments to the contract to extend and/or adjust the term of the contract; rollover unspent funds; and/or increase or decrease funding up to 10 percent above or below the annual base maximum obligation, effective upon amendment execution or at the beginning of the applicable contract term, and make corresponding service adjustments, as necessary. This recommended action will enable DPH to amend the contract to adjust the term for a period of up to six months beyond the expiration date. Such amendments will only be executed if and when there is an unanticipated extension of the term of the applicable grant funding to allow additional time to complete services and utilize grant funding. This authority is being requested to enhance DPH's efforts to expeditiously maximize grant revenue, consistent with Board Policy 4.070: Full Utilization of Grant Funds.

Approval of Recommendation 2 will also enable DPH to amend the contract to allow for the provision of additional units of funded services that are above the service level identified in the current contract

and/or the inclusion of unreimbursed eligible costs, based on the availability of grant funds and grant funder approval. While the County is under no obligation to pay a contractor beyond what is identified in the original executed contract, the County may determine that the contractor has provided evidence of eligible costs for qualifying contracted services and that it is in the County's best interest to increase the maximum contract obligation as a result of receipt of additional grant funds or a determination that funds should be reallocated. This recommendation has no impact on net County cost.

Approval of Recommendation 3 will allow DPH to execute change notices to the contract that authorize modifications to or within budget categories, and corresponding service adjustments, as necessary; changes to hours of operation and/or service locations; and/or corrections of errors in the contract's terms and conditions.

Implementation of Strategic Plan Goals

The recommended actions support Goal 3, Integrated Services Delivery, of the County's Strategic Plan.

FISCAL IMPACT/FINANCING

The total cost of the amendment is $1,980,000 consisting of $660,000 annually for the period March 1, 2016 through February 28, 2017, March 1, 2017 through February 28, 2018 and March 1, 2018 through February 28, 2019;100 percent offset by RWP Part A funds.

Funding is included in DPH's fiscal year (FY) 2015-16 Final Adopted Budget and will be requested in future FYs, as necessary.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

ACMS provides systems license requirements for the Casewatch Data system that is the required data management system for DPH-funded care services providers. Services also include database services such as: administration; security; maintenance; encryption; conversion and migration; design and modification; development of interfaces with other electronic health record systems; reporting to DPH and HRSA on quality assurance and utilization review of care; and completion of Casewatch data quality assurance activities, application system support activities, end user support services, and provider trainings.

As required under Board Policy 5.100, your Board was notified on October 5, 2015 of DPH's intent to extend the term of the sole source contract with ACMS.

The CIO has reviewed this request and has determined that this does not introduce any new technology-related issues that would necessitate the preparation of a formal CIO Analysis.

County Counsel has approved Exhibit I as to use.

CONTRACTING PROCESS

On November 1, 1994, the Board approved ACMS and a former contractor, Data Design and Development (DDD), on a sole source basis as the original agencies that developed the CD4 Online Management and Patient Information System (COMPIS) and Information Management of AIDS Cases and Services (IMACS) computer systems software designed to collect client-level data required by HRSA. These agencies were directly funded by HRSA to design client-level data collection systems for HRSA. In June 1994, DPH submitted an application to HRSA for additional funding to support the "Demonstration of the Usefulness of Client Level Data for Evaluation of HIV/AIDS Services Programs" project. DPH was awarded funding and subsequently entered into sole source contracts for these services with ACMS and DDD in November 1994. These agencies were the only entities that maintained the computer system software COMPIS and IMACS originally used to collect the client-level data required for HRSA reporting.

DPH renewed contracts with both DDD and ACMS as the only agencies that could provide the technical assistance, training, maintenance, and program modifications necessary to allow the collection of the required data. After 2000, DDD no longer provided data management services and ACMS, the developer of the IMACS system, replaced the COMPIS software. ACMS, the sole proprietor of IMACS, updated the client-level data software system, and in 2002 replaced the IMACS software with Casewatch and Casewatch Millennium. ACMS is the sole proprietor and only provider with the rights to maintain this system, which currently supports all DPH-funded HIV care services providers.

ACMS has been providing data management services under the original contract which has undergone multiple amendments. These amendments include term extensions, adjustments to funding allocations, and revisions to scopes of work.

On February 5, 2013, your Board approved the extension of the Contract for the period of March 1, 2013 through February 28, 2015 and delegated authority to extend the term one additional year through February 29, 2016. On February 11, 2015, DPH notified your Board that it was exercising this delegated authority to extend the term through February 29, 2016.

IMPACT ON CURRENT SERVICES (OR PROJECTS)
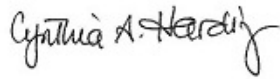
Approval of the recommended actions will allow DPH to continue to provide uninterrupted HIV/AIDS data management and billing support to DPH-contracted care and treatment providers and ensure compliance with State and federal data collection and reporting requirements associated with the delivery of HIV/AIDS care services to County residents.
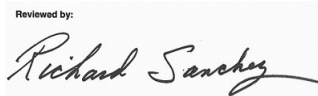
Respectfully submitted,

Cynthia A. Harding, M.P.H.
Interim Director

Reviewed by:

RICHARD SANCHEZ
Chief Information Officer

CAH:jc
BL#03471

Enclosures

c: Chief Executive Officer
     County Counsel
     Acting Executive Officer, Board of Supervisors

**HUMAN IMMUNODEFICIENCY VIRUS (HIV)/
ACQUIRED IMMUNE DEFICIENCY SYNDROME (AIDS)
DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND
MAINTENANCE SERVICES AGREEMENT**

Amendment No. 22

THIS AMENDMENT (hereafter, "Amendment") is made and entered into this ____

_____ day of _____, 2016,

by and between   COUNTY OF LOS ANGELES
(hereafter "County"),

and   AUTOMATED CASE MANAGEMENT
SYSTEMS, INC.
(hereafter "Contractor").

WHEREAS, reference is made to that certain document entitled " HUMAN IMMUNODEFICIENCY VIRUS (HIV)/ACQUIRED IMMUNE DEFICIENCY SYNDROME (AIDS) DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES AGREEMENT", dated January 3, 1995, and further identified as Agreement Number H-204251, and any Amendments thereto (all hereafter "Agreement"); and

WHEREAS, it is the intent of the parties hereto to amend the Agreement to extend the term and increase the maximum obligation and provide other changes set forth herein; and

WHEREAS, said Agreement provides that changes may be made in the form of a written amendment which is formally approved and executed by the parties;

NOW, THEREFORE, the parties hereto agree as follows:

1. This Amendment shall be effective March 1, 2016 (hereafter, "Amendment Effective Date").

2. The first paragraph of Paragraph 1, <u>TERM</u>, shall be amended to read as follows:

"1. <u>TERM</u>: The term of this Agreement shall commence on January 3, 1995 and continue in full force and effect through February 28, 2019, subject to the availability of federal, State, or County funding sources. In any event, County may terminate this Agreement in accordance with the <u>TERMINATION</u> Paragraphs of the ADDITIONAL PROVISIONS hereunder."

3. Paragraph 2, <u>DESCRIPTION OF SERVICES</u>, shall be amended to read as follows:

"2. <u>DESCRIPTION OF SERVICES</u>: Contractor shall provide the services described in Exhibit CC, CC-1, CC-2 and CC-3 and Schedule(s), attached hereto and incorporated herein by reference."

4. Paragraph 4, <u>MAXIMUM OBLIGATION OF COUNTY</u>, Subparagraphs Y, Z, and AA shall be added to read as follows:

"4. <u>MAXIMUM OBLIGATION OF COUNTY</u>:

Y. During the period of March 1, 2016 through February 28, 2017, the maximum obligation of County for all services provided hereunder shall not exceed Six Hundred Sixty Thousand Dollars ($660,000).

Such maximum obligation is comprised of Ryan White Program, Part A funds. This sum represents the total maximum obligation of County as shown in Schedule 34, attached hereto and incorporated herein by reference."

Z. During the period of March 1, 2017 through February 28, 2018, the maximum obligation of County for all services provided hereunder shall not exceed Six Hundred Sixty Thousand Dollars ($660,000).

Such maximum obligation is comprised of Ryan White Program, Part A funds. This sum represents the total maximum obligation of County as shown in Schedule 35, attached hereto and incorporated herein by reference."

AA. During the period of March 1, 2018 through February 28, 2019, the maximum obligation of County for all services provided hereunder shall not exceed Six Hundred Sixty Thousand Dollars ($660,000).

Such maximum obligation is comprised of Ryan White Program, Part A funds. This sum represents the total maximum obligation of County as shown in Schedule 36, attached hereto and incorporated herein by reference."

5. Paragraph 5, <u>COMPENSATION</u>, shall be amended to read as follows:

"5. <u>COMPENSATION</u>: County agrees to compensate Contractor for performing services hereunder for actual allowable reimbursable cost as set forth in Schedules 1 through 33 and Schedules 34, 35, and 36, and the <u>BILLING AND PAYMENT</u> Paragraph of the Agreement. Invoices and cost reports must be submitted and will be reimbursed in accordance with approved line-item detailed budgets."

6. Paragraph 8, <u>CONSIDERATION OF HIRING GAIN/GROW PROGRAM PARTICIPANTS</u>, of ADDITIONAL PROVISIONS, shall be replaced in its entirety to read as follows:

"8. CONSIDERATION OF HIRING GAIN/GROW PARTICIPANTS:

A.   Should the Contractor require additional or replacement personnel after the effective date of this Contract, the Contractor shall give consideration for any such employment openings to participants in the County's Department of Public Social Services Greater Avenues for Independence (GAIN) Program or General Relief Opportunity for Work (GROW) Program who meet the Contractor's minimum qualifications for the open position. For this purpose, consideration shall mean that the Contractor will interview qualified candidates. The County will refer GAIN/GROW participants by job category to the Contractor. Contractors shall report all job openings with job requirements to GainGrow@dpss.lacounty.gov to obtain a list of qualified GAIN/GROW job candidates.

B.   In the event that both laid-off County employees and GAIN/GROW participants are available for hiring, County employees shall be given first priority.

7. Paragraph 38, CONTRACTOR RESPONSIBILITY AND DEBARMENT, of ADDITIONAL PROVISIONS, shall be replaced in its entirety to read as follows:

"38. CONTRACTOR RESPONSIBILITY AND DEBARMENT

A.   Responsible Contractor: A responsible Contractor is a Contractor who has demonstrated the attribute of trustworthiness, as well as quality, fitness, capacity and experience to satisfactorily perform the contract. It is the County's policy to conduct business only with responsible Contractors.

B.   Chapter 2.202 of the County Code: The Contractor is hereby notified that, in accordance with Chapter 2.202 of the County Code, if the County acquires information concerning the performance of the Contractor on this or other contracts which indicates that the Contractor is not responsible, the County

may, in addition to other remedies provided in the Contract, debar the Contractor from bidding or proposing on, or being awarded, and/or performing work on County contracts for a specified period of time, which generally will not exceed five years but may exceed five (5) years or be permanent if warranted by the circumstances, and terminate any or all existing Contracts the Contractor may have with the County.

C.   Non-Responsible Contractor: The County may debar a Contractor if the Board of Supervisors finds, at its discretion, that the Contractor has done any of the following: (1) violated a term of a contract with the County or a nonprofit corporation created by the County, (2) committed an act or omission which negatively reflects on the Contractor's quality, fitness or capacity to perform a contract with the County, any other public entity, or a nonprofit corporation created by the County, or engaged in a pattern or practice which negatively reflects on same, (3) committed an act or offense which indicates a lack of business integrity or business honesty, or (4) made or submitted a false claim against the County or any other public entity.

D.   Contractor Hearing Board: If there is evidence that the Contractor may be subject to debarment, the Department will notify the Contractor in writing of the evidence which is the basis for the proposed debarment and will advise the Contractor of the scheduled date for a debarment hearing before the Contractor Hearing Board.

E.   The Contractor Hearing Board will conduct a hearing where evidence on the proposed debarment is presented. The Contractor and/or the Contractor's representative shall be given an opportunity to submit evidence at

that hearing. After the hearing, the Contractor Hearing Board shall prepare a tentative proposed decision, which shall contain a recommendation regarding whether the Contractor should be debarred, and, if so, the appropriate length of time of the debarment. The Contractor and the Department shall be provided an opportunity to object to the tentative proposed decision prior to its presentation to the Board of Supervisors.

F.	After consideration of any objections, or if no objections are submitted, a record of the hearing, the proposed decision, and any other recommendation of the Contractor Hearing Board shall be presented to the Board of Supervisors. The Board of Supervisors shall have the right to modify, deny, or adopt the proposed decision and recommendation of the Contractor Hearing Board.

G.	If a Contractor has been debarred for a period longer than five (5) years, that Contractor may after the debarment has been in effect for at least five (5) years, submit a written request for review of the debarment determination to reduce the period of debarment or terminate the debarment. The County may, in its discretion, reduce the period of debarment or terminate the debarment if it finds that the Contractor has adequately demonstrated one or more of the following: (1) elimination of the grounds for which the debarment was imposed; (2) a bona fide change in ownership or management; (3) material evidence discovered after debarment was imposed; or (4) any other reason that is in the best interest of the County.

H.	The Contractor Hearing Board will consider a request for review of a debarment determination only where (1) the Contractor has been debarred

for a period longer than five (5) years; (2) the debarment has been in effect for at least five (5) years; and (3) the request is in writing, states one or more of the grounds for reduction of the debarment period or termination of the debarment, and includes supporting documentation. Upon receiving an appropriate request, the Contractor Hearing Board will provide notice of the hearing on the request. At the hearing, the Contractor Hearing Board shall conduct a hearing where evidence on the proposed reduction of debarment period or termination of debarment is presented. This hearing shall be conducted and the request for review decided by the Contractor Hearing Board pursuant to the same procedures as for a debarment hearing.

I.   The Contractor Hearing Board's proposed decision shall contain a recommendation on the request to reduce the period of debarment or terminate the debarment. The Contractor Hearing Board shall present its proposed decision and recommendation to the Board of Supervisors. The Board of Supervisors shall have the right to modify, deny, or adopt the proposed decision and recommendation of the Contractor Hearing Board.

J.   Subcontractors of Contractor: These terms shall also apply to Subcontractors of County Contractors."

8. As of the Amendment Effective Date, Exhibit CC, CC-1, CC-2 and CC-3 SCOPE(S) OF WORK FOR HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES, shall be attached hereto and incorporated herein by reference.

9. As of the Amendment Effective Date, Schedules 34, 35 and 36 BUDGET FOR HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND

MAINTENANCE SERVICES, shall be attached hereto and incorporated herein by reference.

10. Except for the changes set forth herein above, the Agreement shall not be changed in any respect by this Amendment.

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IN WITNESS WHEREOF, the Board of Supervisors of the County of Los Angeles has caused this Amendment to be subscribed by its Interim Director of Public Health, and Contractor has caused this Amendment to be subscribed in its behalf by its duly authorized officer, the day, month, and year first above written.

COUNTY OF LOS ANGELES

By _____

   Cynthia A. Harding, M.P.H.
   Interim Director

AUTOMATED CASE MANAGEMENT
SYSTEMS, INC.
               Contractor

By _____

               Signature

_____

           Printed Name

Title _____

      (AFFIX CORPORATE SEAL)

APPROVED AS TO FORM
BY THE OFFICE OF THE COUNTY COUNSEL
MARY C. WICKHAM
County Counsel

APPROVED AS TO CONTRACT
ADMINISTRATION:

Department of Public Health

By _____

   Patricia Gibson, Chief
   Contracts and Grants Division

BL#03471

EXHIBIT CC

AUTOMATED CASE MANAGEMENT SYSTEMS, INC.

**HUMAN IMMUNODEFICIENCY VIRUS (HIV)/
ACQUIRED IMMUNE DEFICIENCY SYNDROME (AIDS)
DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND
MAINTENANCE SERVICES**

1. Paragraph 2, <u>COUNTY'S MAXIMUM OBLIGATION</u>, shall be amended to add

three subparagraphs to read as follows:

"2. <u>COUNTY'S MAXIMUM OBLIGATION</u>:

During the period of March 1, 2016 through February 28, 2017, that

portion of County's maximum obligation which is allocated under this

Exhibit for HIV/AIDS Data Management, Training, Systems License and

Maintenance Services shall not exceed Six Hundred Sixty Thousand

Dollars ($660,000).

During the period of March 1, 2017 through February 28, 2018, that

portion of County's maximum obligation which is allocated under this

Exhibit for HIV/AIDS Data Management, Training, Systems License and

Maintenance Services shall not exceed Six Hundred Sixty Thousand

Dollars ($660,000).

During the period of March 1, 2018 through February 28, 2019, that

portion of County's maximum obligation which is allocated under this

Exhibit for HIV/AIDS Data Management, Training, Systems License and

Maintenance Services shall not exceed Six Hundred Sixty Thousand

Dollars ($660,000)."

2. Paragraph 3, <u>COMPENSATION</u>, shall be amended to read as follows:

"3. <u>COMPENSATION</u>:

County agrees to compensate Contractor for performing services hereunder for actual allowable reimbursable cost as forth in Schedules 1 through 33 and Schedules 34, 35, and 36 and the <u>BILLING AND PAYMENT</u> Paragraph of the Agreement. Invoices and cost reports must be submitted and will be reimbursed in accordance with approved line-item detailed budgets."

SCHEDULE 34

AUTOMATED CASE MANAGEMENT SYSTEMS, INC.

**HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND
MAINTENANCE SERVICES**

	Budget Period March 1, 2016 Through February 28, 2017
Salaries	$ 0
Employee Benefits	$ 0
Travel	$ 0
Equipment	$ 0
Supplies	$ 0
Other Costs	$ 660,000
Indirect Cost	$ 0
TOTAL PROGRAM BUDGET	$ 660,000

During the term of this Agreement, any variation to the above budget must be executed through a written Change Notice, executed by the Division of HIV and STD Programs' Director and the Contractor. Funds shall only be utilized for eligible program expenses. Invoices and cost reports must be submitted and will be reimbursed in accordance with approved line-item detailed budgets.

SCHEDULE 35

AUTOMATED CASE MANAGEMENT SYSTEMS, INC.

HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES

	Budget Period March 1, 2017 Through February 28, 2018
Salaries	$ 0
Employee Benefits	$ 0
Travel	$ 0
Equipment	$ 0
Supplies	$ 0
Other Costs	$ 660,000
Indirect Cost	$ 0
TOTAL PROGRAM BUDGET	$ 660,000

During the term of this Agreement, any variation to the above budget must be executed through a written Change Notice, executed by the Division of HIV and STD Programs' Director and the Contractor. Funds shall only be utilized for eligible program expenses. Invoices and cost reports must be submitted and will be reimbursed in accordance with approved line-item detailed budgets.

SCHEDULE 36

AUTOMATED CASE MANAGEMENT SYSTEMS, INC.

HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES

	Budget Period March 1, 2018 Through February 28, 2019
Salaries	$ 0
Employee Benefits	$ 0
Travel	$ 0
Equipment	$ 0
Supplies	$ 0
Other Costs	$ 660,000
Indirect Cost	$ 0
TOTAL PROGRAM BUDGET	$ 660,000

During the term of this Agreement, any variation to the above budget must be executed through a written Change Notice, executed by the Division of HIV and STD Programs' Director and the Contractor. Funds shall only be utilized for eligible program expenses. Invoices and cost reports must be submitted and will be reimbursed in accordance with approved line-item detailed budgets.

1.0 Provide Systems License Services	1.1 Provide Casewatch Millennium ® System Software Licenses as required by DHSP. License distribution must be approved by DHSP prior to delivery.	Begin 3/1/16 through 2/28/17	1.1 DHSP monthly report.
	1.2 Deliver, Install and Upgrade, when applicable, the most current version of the Casewatch Millennium® software for each License distributed.	Begin 3/1/16 through 2/28/17	1.2 DHSP monthly report.
	1.3 Conduct License Management activities. - Ensure the number of Licenses distributed coincide with the software deployed. - Ensure Licenses are assigned only when authorized by DHSP. - Ensure all unapproved or unauthorized instances of software are reported to DHSP. - Uninstall and redistribute Licenses that are not utilized for six (6) months or longer. - Track each License distributed. - Report over and under licensing to DHSP.	Begin 3/1/16 through 2/28/17	1.3 License management activity documentation will be kept on file and available for DHSP review upon request.
	1.4 Develop and maintain a software license registry and inventory for the Casewatch Millennium®. - Product edition - Product version - Product release date - Product description	Begin 3/1/16 through 2/28/17	1.4 License registry and inventory documentation will be kept on file and available for DHSP review upon request.

	1.5 Document License Distribution. - User Name - Location, telephone - Issued Date - Type of user	**Begin 3/1/16 through 2/28/17**	**1.5 License documentation will be kept on file and available for DHSP review upon request.**
2.0 Provide Data Administration Services	**2.1 Provide data administration services as follows, but not limited to:**	**Begin 3/1/16 through 2/28/17**	**2.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.**
2A.0 Database Administration	**2A.1 Perform all the Database Administration functions for Casewatch.**	**Begin 3/1/16 through 2/28/17**	**2A.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.**
	2A.2 Implement data standardization as indicated by DHSP.	**Begin 3/1/16 through 2/28/17**	**2A.2 Data standardization documentation will be kept on file and available for DHSP review upon request.**
	2A.3 Implement and manage data tune-ups and other DBA tasks. - Perform database tune-ups and synchronization regularly and on schedule. - Create/modify Caché database user accounts. - Record all Cache database modifications and	**Begin 3/1/16 through 2/28/17**	**2A.3 Data synchronization documentation will be kept on file and available for DHSP review upon request.**

	events in log.		
	- Restart the Caché database immediately. Casewatch must be up and running within one hour after crashes or power failures.		
	- Upgrade Caché database regularly and as required.		
2B.0 Database Security	**2B.1 Manage all aspects of database security including, but not limited to:**	**Begin 3/1/16 through 2/28/17**	**2B.1 User, logging activities, system rights, intrusion, error logs and data validation reports will be kept on file and available for DHSP review upon request.**
	- Ensure only approved users have access to application system functions and "data" for which they are authorized.		
	- Secure the database from intrusion by hackers. System should generate a message following an attempted security break.		
	- Secure the database "data" from mistakes made by ACMS' development staff, maintenance staff, and production database administrator/s.		
	- Secure the database from all sources of invalid "data" including records imported from the Electronic Data Interchange (EDI) modules and/or other servers, and "data" from other ACMS or DHSP application software.		
	- Secure all data and information provided or processed through or on Casewatch, its various functions/modules, all interfaces (to or from). This has to be (at a minimum) to the		

	specifications required by Governmental Authorities and applicable law.		
	2B.2 Provide and maintain secure login procedures including the following: - Intruder Detection – incorrect login attempts. - Password Restrictions – minimum password length, forced periodic changes, unique passwords and limited grace logons.	**Begin 3/1/16 through 2/28/17**	**2B.2 Security logs will be kept on file and available for DHSP review upon request.**
	2B.3 Develop and Implement Security Access Control Groups in Casewatch Millennium®. - Security access control group must ensure that authenticated users have access to the functionality and information that they required and are authorized to and no more.	**Begin 3/1/16 through 2/28/17**	**2B.3 Security Access Control Group documentation will be submitted to DHSP.**
2C.0 Database Maintenance	**2C.1 Monitor the database performance.** - Perform active monitoring and tracking of database performance, disk size allocation, and overall system (application and database) responsiveness. - Install DBMS upgrades and manage all changes to the database.	**Begin 3/1/16 through 2/28/17**	**2C.1 Upgrades and performance documentation will be kept on file and available for DHSP review upon request.**
2D.0 Database Backup and Recovery	**2D.1 Perform Database Backup and Recovery as indicated by DHSP.**	**Begin 3/1/16 through 2/28/17**	**2D.1 Database recovery plan documentation will be submitted to DHSP. If**

	- Perform system Backup and Recovery of the Casewatch database and application software. This has to be performed with a documented, tested, and automated method/s and tool/s to ensure fastest recovery and integrity of both the database and the application. - Implement procedures to restore the database by having several ways of recovering the database information. - Implement a disaster recovery plan in coordination with DHSP allowing no more than one hour of system downtime.		**revisions are made to the recovery plan, such revised portion of the plan must be submitted to DHSP.**
2E.0 Data Encryption	**2E.1 Implement and maintain data encryption implementation in Casewatch.** - At the point where sensitive data first enters the application. - As the data are transmitted between user and the server, EDI processing, and Shadow server. - Where the Casewatch data are stored on a server and database. - Where application data are managed, such as via backup facilities.	**Begin 3/1/16 through 2/28/17**	**2E.1 Encryption methodology will be submitted to DHSP.**
2F.0 Data Conversion and Migration	**2F.1 Provide data conversion and migration services as follows, but not limited to:**	**Begin 3/1/16 through 2/28/17**	**2F.1 Data conversion and migration services will be reported to DHSP.**

	2F.2 Data Extraction - Process data **extraction** for each of the internal repository sources in the Casewatch Millennium® system. - Provide output files of information containing agreed data components in an agreed structured format (e.g. text delimited, Excel) generated according to an agreed running schedule.	**Begin 3/1/16 through 2/28/17**	**2F.2 Data will be extracted and submitted in an agreed structured format to DHSP.**
	2F.3 Data Transport - Transport **extracted** data in a specify form from the source system, Casewatch to DHSP or specify entity for processing, via a temporary storage medium.	**Begin 3/1/16 through 2/28/17**	**2F.3 Extracted data will be transported via a storage medium and submitted to DHSP.**
3.0 Provide Database Design and Modification Services	**3.1 Provide Database Flexibility** - Provide the ability for the database and the application system to accommodate all future growth in capacity and capability as new additional requirements come. - Ensure Casewatch database and the application system modules are flexible and easy to use. - Provide high level of flexibility to the Casewatch form, reports, and process flow.	**Begin 3/1/16 through 2/28/17**	**3.1 Database flexibility documentation will be kept on file and available for DHSP review upon request.**

	3.2 **Modify Database Designs** - Ensure that the Database modification processes (Add, Delete, or Modify schema) of databases, tables, data sets, and fields is performed without any service interruptions and with relative ease. - Ensure the accuracy of "data" values whenever database modifications are performed. - Provide database model (subschema) and documentations of changes whenever database modifications are performed. - Establish database relationships or methods to ensure database integrity and facilitate future data mining and reporting tools.	**Begin 3/1/16 through 2/28/17**	**3.2** **Database design documentation will be kept on file and available for DHSP review upon request.**
	3.3 **Implement and Maintain Data Integrity** - Ensure that the integrity of "data" must be guaranteed and documented with an up to date Database design diagram at all times. - Implement database constraints to enforce new business rules once they are identified by DHSP - Ensure the accuracy of "data" values whenever data modifications are performed.	**Begin 3/1/16 through 2/28/17**	**3.3** **Data integrity documentation and reports will be kept on file and available for DHSP review upon request.**

4.0 Provide Reporting Services	**4.1 Provide User Friendly reporting function and effective report layouts as indicated by DHSP.** - All reports are to provide the specified information, and are understandable, legible, and generated and submitted in a 24 hour period.	**Begin 3/1/16 through 2/28/17**	**4.1 Letter(s) of DHSP approval and reports will be kept on file.**
	4.2 Make reports available for every data element collected in the system.	**Begin 3/1/16 through 2/28/17**	**4.2 Run any report on any given time based on the data collected from Casewatch.**
	4.3 Provide the ability for users to view and print reports via local or network printer.	**Begin 3/1/16 through 2/28/17**	**4.3 Print reports via local or network printer at any given time.**
4A.0 Standard Reports	**4A.1 Prepare and provide DHSP with access to Standard Casewatch Reports on such dates or at such time intervals and in such format as indicated by DHSP.**	**Begin 3/1/16 through 2/28/17**	**4A.1 Run Standard reports at any given time.**
	4A.2 Remain current at all times on reporting expectations for HRSA, CDC, State-OA, and DHSP.	**Begin 3/1/16 through 2/28/17**	**4A.2 Run HRSA, CDC, and State-OA reports.**
	4A.3 Provide aggregate, comparable, demographic and geographic reports and make accessible and available at any given time.	**Begin 3/1/16 through 2/28/17**	**4A.3 Run any given aggregate, comparable, demographic, and geographic report at any given time.**
	4A.4 Provide very detailed Clients and services level reports and make accessible and available at any given time.	**Begin 3/1/16 through 2/28/17**	**4A.4 Run any given aggregate, comparable, demographic, and geographic report at any given time.**

4B.0 Ad Hoc Reports	**4B.1** **Provide Ad Hoc reporting capability through a user-friendly graphical interface.**	**Begin 3/1/16 through 2/28/17**	**4B.1** **Run Ad Hoc reports through the user-friendly graphical interface on a daily, weekly, or monthly basis.**
	4B.2 **Provide canned reports and make available from a menu.** - Provide the ability to filter the data on each report.	**Begin 3/1/16 through 2/28/17**	**4B.2** **Run canned reports from the given menu with the applicable filtering on a daily, weekly, or monthly basis.**
4C.0 Implement and maintain a Centralized Reporting Graphical User Interface	**4C.1** **Implement a centralized user-friendly graphical interface that gives the user the full flexibility of the system and the capability to run all reports under one screen, form or menu.** - Make available any section specific and/or related field for query. - Provide the ability to sort data by multiple fields. - Provide the ability to get full print control functions such as, print preview, pagination and layout controls.	**Begin 3/1/16 through 2/28/17**	**4C.1** **Review and test the centralized user-friendly graphical interface in the server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.**
4D.0 Implement Filtering Parameters to the Centralized Reporting GUI	**4D.1** **Maintain field parameters up-to-date on to the centralized reporting GUI for the following data fields, but not limited to:** - Date, Month, Year parameters selection.	**Begin 3/1/16 through 2/28/17**	**4D.1** **Review and test the parameter selection on user-friendly graphical interface in the report server. All GUI reporting features**

	- Provider and Site parameter selection - SPA parameter selection - Services Category, Sub Category, and Service, - Ethnicity, Age, and Gender parameter selection - Contract Number		**documentation will be kept on file and available for DHSP review upon request.**
4E.0 Shadow Server	**4E.1 Provide shadow server maintenance.** - Shadow server is to be the exact replica and serve as the full back-up of the Casewatch Millennium®. - Keep server's data up-to-date by replicating Casewatch's data onto the shadow server on a daily basis. - Provide the ability for the shadow server to accommodate all future growth in capacity and capability as new additional requirements are identified. - Shadow server is to be the exact replica of the Casewatch Millennium®.	**Begin 3/1/16 through 2/28/17**	**4E.1 Test shadow server by running various reports and viewing information.**
5.0 Data Extraction Requirements	**5.1 Data extraction requirements for DHSP, State-OA, CDC, and HRSA.**	**Begin 3/1/16 through 2/28/17**	**5.1 Data set log will be kept on file and available for DHSP to review upon request.**
	5.2 Provide in a predefine format all the data, including historical and archive data, collected in the Casewatch Millennium® and preceding application systems to DHSP	**Begin 3/1/16 through 2/28/17**	**5.2 Data set log will be kept on file and available for DHSP to review upon request.**

	electronically via a method indicated by DHSP. - All data must be exported as requested by DHSP.		
6.0 Provide Application System Modification and Programming Services	**6.1 Provide system application modification as needed or as requested by DHSP not to exceed 1,600 programming hours for the term (programming hour cap applies to 6.0, 6.1 and 6.2 together).** - Provision for Casewatch changes requested by DHSP, in order to collect data more efficiently.	**Begin 3/1/16 through 2/28/17**	**6.1 DHSP monthly status report.**
	6.2 Provide programming support. - Perform Bug fixes and enhancements.	**Begin 3/1/16 through 2/28/17**	**6.2 DHSP monthly status report.**
	6.3 Provide programs modification for the Casewatch's Electronic Data Interface (EDI) module for new agencies as requested by DHSP.	**Begin 3/1/16 through 2/28/17**	**6.3 EDI modification documentation will be kept on file and available for DHSP review upon request.**
7.0 Provide on-going Electronic Data Interchange (EDI) services to Care System providers.	**7.1 Support the use of Electronic Data Interchange (EDI) to Care Services providers as indicated by DHSP.** - Support all inbound/outbound EDI transactions, data standards, code sets and industry standards and extension such as, but not limited to CPT4.	**Begin 3/1/16 through 2/28/17**	**7.1 DHSP monthly status report.**

	7.2	Perform data validation and apply methods and rules to ensure data quality in the EDI module.	Begin 3/1/16 through 2/28/17	7.2	System documentation and logs will be kept on file and available for DHSP review upon request.
	7.3	Make available all data imported by the EDI module in all Casewatch modules and functions, including, but not limited to: - Add, Delete, Modify/Editing and reporting	Begin 3/1/16 through 2/28/17	7.3	Monthly Electronic generated Casewatch report.
	7.4	Provide the feature to perform interface data maintenances for all Casewatch EDI transmitted data:- - Adding, Deleting, Modifying and View/Print.	Begin 3/1/16 through 2/28/17	7.4	Maintenance logs will be kept on file and available for DHSP review upon request.
	7.5	Installation of new Electronic Data Interchange (EDI) module must be approved by DHSP prior to initiating work.	Begin 3/1/16 through 2/28/17	7.5	Letter(s) of DHSP approval and materials will be kept on file.
8.0 Quality Assurance & Utilization Review of Care Services	8.1	Collaborate with DHSP to maintain a quality assurance system to monitor the quality of Care Services. - Compile data using sampling techniques, statistical analysis and computer resources. - Assist DHSP to analyze and interpret data to determine quality of patient care and to identify problems, patterns, and high-risk activities.	Begin 3/1/16 through 2/28/17	8.1	Letter(s) of DHSP approval and materials will be kept on file.

	- Assist DHSP to disseminates data and results of studies; develop and maintain clinical and administrative records and reporting systems.		
8A.0 Casewatch Data Quality Assurance	**8A.1 Collaborate with DHSP Data Management to maintain and support Data Quality Assurance tasks.** - Collaborate with DHSP in identifying and developing data standards, validation rules, database constraints, and business rules. - Maintain system, module, function, and form level data entry validation rules, database constraints, business rules, and data standards. - The implementation of database and application system validations, database constraints, and business rules must enable rejection of all types of data that don't conform to these rules. - Additionally utilize Data Entry/Maintenance Reports "Error Report" to print data with discrepancies, errors, and problems from a temporary file.	**Begin 3/1/16 through 2/28/17**	**8A.1 Letter(s) of DHSP approval and materials will be kept on file.**
9.0 Provide Regular System Updates	**9.1 Provide application system software updates as needed to all HIV Care Services providers and DHSP.**	**Begin 3/1/16 through 2/28/17**	**9.1 DHSP monthly status report.**

		9.2	Install and configure the server software updates and the client software updates to all Providers. ACMS will then train the IT personnel assigned to the project for ongoing client software installations	Begin 3/1/16 through 2/28/17	9.2 DHSP monthly status report.
10.0	Provide Application System Support	10.1	Provide system configuration, installation, and set up support for Casewatch users.	Begin 3/1/16 through 2/28/17	10.1 DHSP monthly status report.
		10.2	Provide maintenance for all the Casewatch modules including the following functions: - Adding, Deleting, Modifying, and Programming	Begin 3/1/16 through 2/28/17	10.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request
10A.0	Provide Application Systems Administration	10A.1	Provide application development support to keep the application operating in a changing business & technical environment. - Create/modify Casewatch Application System user accounts. - Record all Application System/Modules modifications and events in log. - Restart the Application System within one hour after panics, crashes, or power failures. - Upgrade Casewatch Application System regularly and as required.	Begin 3/1/16 through 2/28/17	10A.1 DHSP monthly status report. System maintenance and modification, user, and event logs will be kept on file and available for DHSP review upon request.
11.0	Provide End-User Support	11.1	Casewatch end user support includes, but not limited to: - Provide on-going telephone customer support and help desk coverage.	Begin 3/1/16 through 2/28/17	11.1 DHSP monthly status report.

	- Return phone calls within thirty minutes.		
	- Provide help desk support and coordinate resolution when a problem arises with the system.		
	- Employ a help-desk system as a tool for managing duties, communicating issues and to generate daily, weekly and monthly log reports.		
	- Implement a triage system for all Casewatch technology needs and inquiries from providers and DHSP.		
	- Provide services from 8:00 A.M. and 5:00 P.M., Monday through Friday, Pacific Time, excluding Los Angeles County legal holidays.		
	11.1a Resolve Casewatch user problems for all related modules.	**Begin 3/1/16 through 2/28/17**	**11.1a Support log will be kept on file and available for DHSP review upon request.**
	11.2 Provide Software support	**Begin 3/1/16 through 2/28/17**	**11.2 DHSP monthly status report.**
	- Install, configure, and setup the Casewatch application, including the installation and updating of drivers and other files necessary to allow the application to work properly on all users' computers. These activities apply to all providers and DHSP on an ongoing-basis.		
12.0 Provide Implementation Services	**12.1 Migrate new providers to Casewatch.**	**Begin 3/1/16 through 2/28/17**	**12.1 DHSP monthly status report.**

	12.2 Submit Implementation Plan Submit a written implementation plan showing: - List of tasks - Task duration - Milestones - Resource levels and allocation - Resource levels and allocation ACMS must submit a written plan explaining any possible constraints or deviations to the submitted plan.	**Begin 3/1/16 through 2/28/17**	**12.2 Implementation Plan will be submitted to DHSP for approval.**
	12.3 Install and configure the server software and the client software to all Providers and train the IT personnel assigned to the project for ongoing client software installations.	**Begin 3/1/16 through 2/28/17**	**12.3 Implementation Plan will be submitted to DHSP.**
13.0 System Documentation	**13.1 Provide Casewatch Millennium® Manuals.**	**Begin 3/1/16 through 2/28/17**	**13.1 Manuals will be submitted to DHSP.**
	13.2 Provide User Manual - User Manual must be updated annually or as requested by DHSP. - Determine the effectiveness of the user manual by documenting feedback from users.	**Begin 3/1/16 through 2/28/17**	**13.2 User Manual will be annually submitted to DHSP.**
	13.3 Provide Administration and Operations Manual - Manuals must be updated annually or as	**Begin 3/1/16 through 2/28/17**	**13.3 Administration and Operations Manuals will be annually submitted to DHSP.**

			requested by DHSP.		
		13.4	Maintain an up-to-date Casewatch's dictionary's data element documentation for all service modules as follows: - Data Element Name - Description - Screen location including a screenshot - Physical Attributes - Validation Rules and Business Rules associated with the data element - Default Values	Begin 3/1/16 through 2/28/17	13.4 Data element documentation will be kept on file kept and available for DHSP review upon request.
		13.5	Maintain an up-to-date documentation on how the Casewatch's Electronic Data Interface (EDI) module software provides data validation.	Begin 3/1/16 through 2/28/17	13.5 EDI's data validation documents will be kept on file and available for DHSP review upon request.
		13.6	Maintain an up-to-date documentation on the methodologies, algorithms, and business rules utilized by the Casewatch's Electronic Data Interface (EDI) module.	Begin 3/1/16 through 2/28/17	13.6 Methodologies, algorithms, and business rules documentation will be kept on file and available for DHSP review upon request.
14.0 Data Dictionary Maintenance		14.1	Create, update and maintain system dictionaries and tables, including service provider specific fee schedules.	Begin 3/1/16 through 2/28/17	14.1 Logs will be kept on file and available for DHSP review upon request.
		14.2	Provide maintenance of all Casewatch dictionaries including, but not limited to: - Adding, Deleting, Modifying, & Programming	Begin 3/1/16 through 2/28/17	14.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request.

15.0 Provide Training Services	15.1 Provide hands-on technical software training to DHSP personnel as needed or as requested by DHSP.	Begin 3/1/16 through 2/28/17	15.1 DHSP monthly status report.
	15.2 Provide classroom and hands-on Casewatch application training to provider's end-users and DHSP staff.	Begin 3/1/16 through 2/28/17	15.2 Classroom location and capacity report will be submitted to DHSP.
	15.3 Provide up to date training materials to all attendees. - Material must be updated annually or as requested by DHSP.	Begin 3/1/16 through 2/28/17	15.3 Training materials will be submitted to DHSP.
	15.4 Provide a "Train the Trainer" curriculum with training materials.	Begin 3/1/16 through 2/28/17	15.4 Curriculum will be submitted to DHSP.
	15.5 Provide a training curriculum to be approved by DHSP in writing fifteen (15) days prior to training.	Begin 3/1/16 through 2/28/17	15.5 Training curriculum will be submitted to DHSP for approval.
	15.6 Submit a list of available training sessions with content overview.	Begin 3/1/16 through 2/28/17	15.6 Training schedule will be submitted to DHSP.
	15.7 Submit a training plan for both providers and DHSP personnel.	Begin 3/1/16 through 2/28/17	15.7 Training plan will be submitted to DHSP.
	15.8 Submit examples of the existing training material.	Begin 3/1/16 through 2/28/17	15.8 Existing material will be submitted to DHSP.
	15.9 Create monthly training schedule. (Classes will be offered weekly for each service	Begin 3/1/16 through 2/28/17	15.9 Monthly schedule will be submitted to DHSP.

	category.)		
	15.10 Distribute class schedule to all providers and DHSP staff at least one month prior to the training.	**Begin 3/1/16 through 2/28/17**	15.10 Monthly schedule will be submitted to DHSP one month prior to the training.
	15.11 Conduct enrollment activities.	**Begin 3/1/16 through 2/28/17**	15.11 Enrollment logs will be kept on file and available for DHSP review upon request.
	15.12 Develop a post exam for the end-user trainee on the course content to determine if additional training is needed. - If needed, re-scheduling of training must be provided. - Provide a certification of completion for trainees who pass the post exam and include a letter recommending a follow-up training every six months.	**Begin 3/1/16 through 2/28/17**	15.12 Incorporate post exam to determine effectiveness of training. Effectiveness documentation, post exams and certifications will be kept on file and available for DHSP review upon request.
	15.13 Distribute DHSP's class evaluation, which should be completed by the end-user that attends the class.	**Begin 3/1/16 through 2/28/17**	15.13 Class evaluations will be submitted to DHSP

1.0 Provide Systems License Services	1.1 Provide Casewatch Millennium ® System Software Licenses as required by DHSP. License distribution must be approved by DHSP prior to delivery.	Begin 3/1/17 through 2/28/18	1.1 DHSP monthly report.
	1.2 Deliver, Install and Upgrade, when applicable, the most current version of the Casewatch Millennium® software for each License distributed.	Begin 3/1/17 through 2/28/18	1.2 DHSP monthly report.
	1.3 Conduct License Management activities. - Ensure the number of Licenses distributed coincide with the software deployed. - Ensure Licenses are assigned only when authorized by DHSP. - Ensure all unapproved or unauthorized instances of software are reported to DHSP. - Uninstall and redistribute Licenses that are not utilized for six (6) months or longer. - Track each License distributed. - Report over and under licensing to DHSP.	Begin 3/1/17 through 2/28/18	1.3 License management activity documentation will be kept on file and available for DHSP review upon request.
	1.4 Develop and maintain a software license registry and inventory for the Casewatch Millennium®. - Product edition - Product version - Product release date - Product description	Begin 3/1/17 through 2/28/18	1.4 License registry and inventory documentation will be kept on file and available for DHSP review upon request.

	1.5 Document License Distribution. - User Name - Location, telephone - Issued Date - Type of user	**Begin 3/1/17 through 2/28/18**	**1.5 License documentation will be kept on file and available for DHSP review upon request.**
2.0 Provide Data Administration Services	**2.1 Provide data administration services as follows, but not limited to:**	**Begin 3/1/17 through 2/28/18**	**2.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.**
2A.0 Database Administration	**2A.1 Perform all the Database Administration functions for Casewatch.**	**Begin 3/1/17 through 2/28/18**	**2A.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.**
	2A.2 Implement data standardization as indicated by DHSP.	**Begin 3/1/17 through 2/28/18**	**2A.2 Data standardization documentation will be kept on file and available for DHSP review upon request.**
	2A.3 Implement and manage data tune-ups and other DBA tasks. - Perform database tune-ups and synchronization regularly and on schedule. - Create/modify Caché database user accounts. - Record all Cache database modifications and events in log.	**Begin 3/1/17 through 2/28/18**	**2A.3 Data synchronization documentation will be kept on file and available for DHSP review upon request.**

	- Restart the Caché database immediately. Casewatch must be up and running within one hour after crashes or power failures. - Upgrade Caché database regularly and as required.		
2B.0 Database Security	**2B.1** **Manage all aspects of database security including, but not limited to:** - Ensure only approved users have access to application system functions and "data" for which they are authorized. - Secure the database from intrusion by hackers. System should generate a message following an attempted security break. - Secure the database "data" from mistakes made by ACMS' development staff, maintenance staff, and production database administrator/s. - Secure the database from all sources of invalid "data" including records imported from the Electronic Data Interchange (EDI) modules and/or other servers, and "data" from other ACMS or DHSP application software. - Secure all data and information provided or processed through or on Casewatch, its various functions/modules, all interfaces (to or from). This has to be (at a minimum) to the specifications required by Governmental	**Begin 3/1/17 through 2/28/18**	**2B.1** **User, logging activities, system rights, intrusion, error logs and data validation reports will be kept on file and available for DHSP review upon request.**

		Authorities and applicable law.	
	2B.2 Provide and maintain secure login procedures including the following: - Intruder Detection – incorrect login attempts. - Password Restrictions – minimum password length, forced periodic changes, unique passwords and limited grace logons.	**Begin 3/1/17 through 2/28/18**	**2B.2 Security logs will be kept on file and available for DHSP review upon request.**
	2B.3 Develop and Implement Security Access Control Groups in Casewatch Millennium®. - Security access control group must ensure that authenticated users have access to the functionality and information that they required and are authorized to and no more.	**Begin 3/1/17 through 2/28/18**	**2B.3 Security Access Control Group documentation will be submitted to DHSP.**
2C.0 Database Maintenance	**2C.1 Monitor the database performance.** - Perform active monitoring and tracking of database performance, disk size allocation, and overall system (application and database) responsiveness. - Install DBMS upgrades and manage all changes to the database.	**Begin 3/1/17 through 2/28/18**	**2C.1 Upgrades and performance documentation will be kept on file and available for DHSP review upon request.**
2D.0 Database Backup and Recovery	**2D.1 Perform Database Backup and Recovery as indicated by DHSP.** - Perform system Backup and Recovery of the Casewatch database and application software.	**Begin 3/1/17 through 2/28/18**	**2D.1 Database recovery plan documentation will be submitted to DHSP. If revisions are made to the recovery plan, such revised**

	This has to be performed with a documented, tested, and automated method/s and tool/s to ensure fastest recovery and integrity of both the database and the application. - Implement procedures to restore the database by having several ways of recovering the database information. - Implement a disaster recovery plan in coordination with DHSP allowing no more than one hour of system downtime.		**portion of the plan must be submitted to DHSP.**
2E.0 Data Encryption	**2E.1 Implement and maintain data encryption implementation in Casewatch.** - At the point where sensitive data first enters the application. - As the data are transmitted between user and the server, EDI processing, and Shadow server. - Where the Casewatch data are stored on a server and database. - Where application data are managed, such as via backup facilities.	**Begin 3/1/17 through 2/28/18**	**2E.1 Encryption methodology will be submitted to DHSP.**
2F.0 Data Conversion and Migration	**2F.1 Provide data conversion and migration services as follows, but not limited to:**	**Begin 3/1/17 through 2/28/18**	**2F.1 Data conversion and migration services will be reported to DHSP.**
	2F.2 Data Extraction	**Begin 3/1/17 through 2/28/18**	**2F.2 Data will be extracted and submitted in an agreed**

	- Process data **extraction** for each of the internal repository sources in the Casewatch Millennium® system. - Provide output files of information containing agreed data components in an agreed structured format (e.g. text delimited, Excel) generated according to an agreed running schedule.		**structured format to DHSP.**
	2F.3 Data Transport - Transport **extracted** data in a specify form from the source system, Casewatch to DHSP or specify entity for processing, via a temporary storage medium.	**Begin 3/1/17 through 2/28/18**	**2F.3 Extracted data will be transported via a storage medium and submitted to DHSP.**
3.0 Provide Database Design and Modification Services	**3.1 Provide Database Flexibility** - Provide the ability for the database and the application system to accommodate all future growth in capacity and capability as new additional requirements come. - Ensure Casewatch database and the application system modules are flexible and easy to use. - Provide high level of flexibility to the Casewatch form, reports, and process flow.	**Begin 3/1/17 through 2/28/18**	**3.1 Database flexibility documentation will be kept on file and available for DHSP review upon request.**
	3.2 Modify Database Designs - Ensure that the Database modification	**Begin 3/1/17 through 2/28/18**	**3.2 Database design documentation will be kept on file and available for**

	processes (Add, Delete, or Modify schema) of databases, tables, data sets, and fields is performed without any service interruptions and with relative ease. - Ensure the accuracy of "data" values whenever database modifications are performed. - Provide database model (subschema) and documentations of changes when ever database modifications are performed. - Establish database relationships or methods to ensure database integrity and facilitate future data mining and reporting tools.		**DHSP review upon request.**
	3.3 Implement and Maintain Data Integrity - Ensure that the integrity of "data" must be guaranteed and documented with an up to date Database design diagram at all times. - Implement database constraints to enforce new business rules once they are identified by DHSP. - Ensure the accuracy of "data" values whenever data modifications are performed.	**Begin 3/1/17 through 2/28/18**	**3.3 Data integrity documentation and reports will be kept on file and available for DHSP review upon request.**
4.0 Provide Reporting Services	**4.1 Provide User Friendly reporting function and effective report layouts as indicated by DHSP.** - All reports are to provide the specified	**Begin 3/1/17 through 2/28/18**	**4.1 Letter(s) of DHSP approval and reports will be kept on file.**

	information, and are understandable, legible, and generated and submitted in a 24 hour period.		
	4.2 Make reports available for every data element collected in the system.	Begin 3/1/17 through 2/28/18	4.2 Run any report on any given time based on the data collected from Casewatch.
	4.3 Provide the ability for users to view and print reports via local or network printer.	Begin 3/1/17 through 2/28/18	4.3 Print reports via local or network printer at any given time.
4A.0 Standard Reports	4A.1 Prepare and provide DHSP with access to Standard Casewatch Reports on such dates or at such time intervals and in such format as indicated by DHSP.	Begin 3/1/17 through 2/28/18	4A.1 Run Standard reports at any given time.
	4A.2 Remain current at all times on reporting expectations for HRSA, CDC, State-OA, and DHSP.	Begin 3/1/17 through 2/28/18	4A.2 Run HRSA, CDC, and State-OA reports.
	4A.3 Provide aggregate, comparable, demographic and geographic reports and make accessible and available at any given time.	Begin 3/1/17 through 2/28/18	4A.3 Run any given aggregate, comparable, demographic, and geographic report at any given time.
	4A.4 Provide very detailed Clients and services level reports and make accessible and available at any given time.	Begin 3/1/17 through 2/28/18	4A.4 Run any given aggregate, comparable, demographic, and geographic report at any given time.
4B.0 Ad Hoc Reports	4B.1 Provide Ad Hoc reporting capability through a user-friendly graphical interface.	Begin 3/1/17 through 2/28/18	4B.1 Run Ad Hoc reports through the user-friendly graphical interface on a daily, weekly, or monthly basis.

	4B.2 **Provide canned reports and make available from a menu.** - Provide the ability to filter the data on each report.	**Begin 3/1/17 through 2/28/18**	**4B.2** **Run canned reports from the given menu with the applicable filtering on a daily, weekly, or monthly basis.**
4C.0 Implement and maintain a Centralized Reporting Graphical User Interface	**4C.1** **Implement a centralized user-friendly graphical interface that gives the user the full flexibility of the system and the capability to run all reports under one screen, form or menu.** - Make available any section specific and/or related field for query. - Provide the ability to sort data by multiple fields. - Provide the ability to get full print control functions such as, print preview, pagination and layout controls.	**Begin 3/1/17 through 2/28/18**	**4C.1** **Review and test the centralized user-friendly graphical interface in the server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.**
4D.0 Implement Filtering Parameters to the Centralized Reporting GUI	**4D.1** **Maintain field parameters up-to-date on to the centralized reporting GUI for the following data fields, but not limited to:** - Date, Month, Year parameters selection. - Provider and Site parameter selection - SPA parameter selection - Services Category, Sub Category, and Service, - Ethnicity, Age, and Gender parameter selection - Contract Number	**Begin 3/1/17 through 2/28/18**	**4D.1** **Review and test the parameter selection on user-friendly graphical interface in the report server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.**

4E.0 Shadow Server	**4E.1 Provide shadow server maintenance.** - Shadow server is to be the exact replica and serve as the full back-up of the Casewatch Millennium®. - Keep server's data up-to-date by replicating Casewatch's data onto the shadow server on a daily basis. - Provide the ability for the shadow server to accommodate all future growth in capacity and capability as new additional requirements are identified. - Shadow server is to be the exact replica of the Casewatch Millennium®.	**Begin 3/1/17 through 2/28/18**	**4E.1 Test shadow server by running various reports and viewing information.**
5.0 Data Extraction Requirements	**5.1 Data extraction requirements for DHSP, State-OA, CDC, and HRSA.**	**Begin 3/1/17 through 2/28/18**	**5.1 Data set log will be kept on file and available for DHSP to review upon request.**
	5.2 Provide in a predefine format all the data, including historical and archive data, collected in the Casewatch Millennium® and preceding application systems to DHSP electronically via a method indicated by DHSP. - All data must be exported as requested by DHSP.	**Begin 3/1/17 through 2/28/18**	**5.2 Data set log will be kept on file and available for DHSP to review upon request.**

6.0 Provide Application System Modification and Programming Services	**6.1** Provide system application modification as needed or as requested by DHSP not to exceed 1,600 programming hours for the term (programming hour cap applies to 6.0, 6.1 and 6.2 together). - Provision for Casewatch changes requested by DHSP, in order to collect data more efficiently.	**Begin 3/1/17 through 2/28/18**	**6.1 DHSP monthly status report.**
	6.2 Provide programming support. - Perform Bug fixes and enhancements.	**Begin 3/1/17 through 2/28/18**	**6.2 DHSP monthly status report.**
	6.3 Provide programs modification for the Casewatch's Electronic Data Interface (EDI) module for new agencies as requested by DHSP.	**Begin 3/1/17 through 2/28/18**	**6.3 EDI modification documentation will be kept on file and available for DHSP review upon request.**
7.0 Provide on-going Electronic Data Interchange (EDI) services to Care System providers.	**7.1 Support the use of Electronic Data Interchange (EDI) to Care Services providers as indicated by DHSP.** - Support all inbound/outbound EDI transactions, data standards, code sets and industry standards and extension such as, but not limited to CPT4.	**Begin 3/1/17 through 2/28/18**	**7.1 DHSP monthly status report.**
	7.2 Perform data validation and apply methods and rules to ensure data quality in the EDI module.	**Begin 3/1/17 through 2/28/18**	**7.2 System documentation and logs will be kept on file and available for DHSP review upon request.**
	7.3 Make available all data imported by the EDI module in all Casewatch modules and	**Begin 3/1/17 through 2/28/18**	**7.3 Monthly Electronic generated Casewatch report.**

		functions, including, but not limited to: - Add, Delete, Modify/Editing and reporting		
	7.4	**Provide the feature to perform interface data maintenances for all Casewatch EDI transmitted data:-** - Adding, Deleting, Modifying and View/Print.	**Begin 3/1/17 through 2/28/18**	7.4 **Maintenance logs will be kept on file and available for DHSP review upon request.**
	7.5	**Installation of new Electronic Data Interchange (EDI) module must be approved by DHSP prior to initiating work.**	**Begin 3/1/17 through 2/28/18**	7.5 **Letter(s) of DHSP approval and materials will be kept on file.**
8.0 **Quality Assurance & Utilization Review of Care Services**	8.1	**Collaborate with DHSP to maintain a quality assurance system to monitor the quality of Care Services.** - Compile data using sampling techniques, statistical analysis and computer resources. - Assist DHSP to analyze and interpret data to determine quality of patient care and to identify problems, patterns, and high-risk activities. - Assist DHSP to disseminates data and results of studies; develop and maintain clinical and administrative records and reporting systems.	**Begin 3/1/17 through 2/28/18**	8.1 **Letter(s) of DHSP approval and materials will be kept on file.**
8A.0 **Casewatch Data Quality Assurance**	8A.1	**Collaborate with DHSP Data Management to maintain and support Data Quality**	**Begin 3/1/17 through 2/28/18**	8A.1 **Letter(s) of DHSP approval and materials will be kept on file.**

	Assurance tasks.			
	- Collaborate with DHSP in identifying and developing data standards, validation rules, database constraints, and business rules.			
	- Maintain system, module, function, and form level data entry validation rules, database constraints, business rules, and data standards.			
	- The implementation of database and application system validations, database constraints, and business rules must enable rejection of all types of data that don't conform to these rules.			
	- Additionally utilize Data Entry/Maintenance Reports "Error Report" to print data with discrepancies, errors, and problems from a temporary file.			
9.0 Provide Regular System Updates	9.1 Provide application system software updates as needed to all HIV Care Services providers and DHSP.	**Begin 3/1/17 through 2/28/18**	9.1 DHSP monthly status report.	
	9.2 Install and configure the server software updates and the client software updates to all Providers. ACMS will then train the IT personnel assigned to the project for ongoing client software installations.	**Begin 3/1/17 through 2/28/18**	9.2 DHSP monthly status report.	
10.0 Provide Application System Support	10.1 Provide system configuration, installation, and set up support for Casewatch users.	**Begin 3/1/17 through 2/28/18**	10.1 DHSP monthly status report.	

	10.2 Provide maintenance for all the Casewatch modules including the following functions: - Adding, Deleting, Modifying, and Programming	**Begin 3/1/17 through 2/28/18**	**10.2** System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request
10A.0 Provide Application Systems Administration	**10A.1** Provide application development support to keep the application operating in a changing business & technical environment. - Create/modify Casewatch Application System user accounts. - Record all Application System/Modules modifications and events in log. - Restart the Application System within one hour after panics, crashes, or power failures. - Upgrade Casewatch Application System regularly and as required.	**Begin 3/1/17 through 2/28/18**	**10A.1 DHSP monthly status report. System maintenance and modification, user, and event logs will be kept on file and available for DHSP review upon request.**
11.0 Provide End-User Support	**11.1** Casewatch end user support includes, but not limited to: - Provide on-going telephone customer support and help desk coverage. - Return phone calls within thirty minutes. - Provide help desk support and coordinate resolution when a problem arises with the system. - Employ a help-desk system as a tool for managing duties, communicating issues and to	**Begin 3/1/17 through 2/28/18**	**11.1 DHSP monthly status report.**

	generate daily, weekly and monthly log reports.		
	- Implement a triage system for all Casewatch technology needs and inquiries from providers and DHSP.		
	- Provide services from 8:00 A.M. and 5:00 P.M., Monday through Friday, Pacific Time, excluding Los Angeles County legal holidays.		
	11.1a Resolve Casewatch user problems for all related modules.	**Begin 3/1/17 through 2/28/18**	**11.1a Support log will be kept on file and available for DHSP review upon request.**
	11.2 Provide Software support	**Begin 3/1/17 through 2/28/18**	**11.2 DHSP monthly status report.**
	- Install, configure, and setup the Casewatch application, including the installation and updating of drivers and other files necessary to allow the application to work properly on all users' computers. These activities apply to all providers and DHSP on an ongoing-basis.		
12.0 Provide Implementation Services	**12.1 Migrate new providers to Casewatch.**	**Begin 3/1/17 through 2/28/18**	**12.1 DHSP monthly status report.**
	12.2 Submit Implementation Plan Submit a written implementation plan showing: - List of tasks - Task duration - Milestones - Resource levels and allocation - Resource levels and allocation ACMS must submit	**Begin 3/1/17 through 2/28/18**	**12.2 Implementation Plan will be submitted to DHSP for approval.**

		a written plan explaining any possible constraints or deviations to the submitted plan.	
	12.3 Install and configure the server software and the client software to all Providers and train the IT personnel assigned to the project for ongoing client software installations.	**Begin 3/1/17 through 2/28/18**	**12.3 Implementation Plan will be submitted to DHSP.**
13.0 System Documentation	**13.1 Provide Casewatch Millennium® Manuals.**	**Begin 3/1/17 through 2/28/18**	**13.1 Manuals will be submitted to DHSP.**
	13.2 Provide User Manual - User Manual must be updated annually or as requested by DHSP. - Determine the effectiveness of the user manual by documenting feedback from users.	**Begin 3/1/17 through 2/28/18**	**13.2 User Manual will be annually submitted to DHSP.**
	13.3 Provide Administration and Operations Manual - Manuals must be updated annually or as requested by DHSP.	**Begin 3/1/17 through 2/28/18**	**13.3 Administration and Operations Manuals will be annually submitted to DHSP.**
	13.4 Maintain an up-to-date Casewatch's dictionary's data element documentation for all service modules as follows: - Data Element Name - Description - Screen location including a screenshot - Physical Attributes	**Begin 3/1/17 through 2/28/18**	**13.4 Data element documentation will be kept on file kept and available for DHSP review upon request.**

	- Validation Rules and Business Rules associated with the data element - Default Values		
	13.5 Maintain an up-to-date documentation on how the Casewatch's Electronic Data Interface (EDI) module software provides data validation.	**Begin 3/1/17 through 2/28/18**	**13.5 EDI's data validation documents will be kept on file and available for DHSP review upon request.**
	13.6 Maintain an up-to-date documentation on the methodologies, algorithms, and business rules utilized by the Casewatch's Electronic Data Interface (EDI) module.	**Begin 3/1/17 through 2/28/18**	**13.6 Methodologies, algorithms, and business rules documentation will be kept on file and available for DHSP review upon request.**
14.0 Data Dictionary Maintenance	**14.1 Create, update and maintain system dictionaries and tables, including service provider specific fee schedules.**	**Begin 3/1/17 through 2/28/18**	**14.1 Logs will be kept on file and available for DHSP review upon request.**
	14.2 Provide maintenance of all Casewatch dictionaries including, but not limited to: – Adding, Deleting, Modifying, & Programming	**Begin 3/1/17 through 2/28/18**	**14.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request.**
15.0 Provide Training Services	**15.1 Provide hands-on technical software training to DHSP personnel as needed or as requested by DHSP.**	**Begin 3/1/17 through 2/28/18**	**15.1 DHSP monthly status report.**
	15.2 Provide classroom and hands-on Casewatch application training to provider's end-users and DHSP staff.	**Begin 3/1/17 through 2/28/18**	**15.2 Classroom location and capacity report will be submitted to DHSP.**
	15.3 Provide up to date training materials to all attendees.	**Begin 3/1/17 through 2/28/18**	**15.3 Training materials will be submitted to DHSP.**

	- Material must be updated annually or as requested by DHSP.		
	15.4 Provide a "Train the Trainer" curriculum with training materials.	**Begin 3/1/17 through 2/28/18**	**15.4 Curriculum will be submitted to DHSP.**
	15.5 Provide a training curriculum to be approved by DHSP in writing fifteen (15) days prior to training.	**Begin 3/1/17 through 2/28/18**	**15.5 Training curriculum will be submitted to DHSP for approval.**
	15.6 Submit a list of available training sessions with content overview.	**Begin 3/1/17 through 2/28/18**	**15.6 Training schedule will be submitted to DHSP.**
	15.7 Submit a training plan for both providers and DHSP personnel.	**Begin 3/1/17 through 2/28/18**	**15.7 Training plan will be submitted to DHSP.**
	15.8 Submit examples of the existing training material.	**Begin 3/1/17 through 2/28/18**	**15.8 Existing material will be submitted to DHSP.**
	15.9 Create monthly training schedule. (Classes will be offered weekly for each service category.)	**Begin 3/1/17 through 2/28/18**	**15.9 Monthly schedule will be submitted to DHSP.**
	15.10 Distribute class schedule to all providers and DHSP staff at least one month prior to the training.	**Begin 3/1/17 through 2/28/18**	**15.10 Monthly schedule will be submitted to DHSP one month prior to the training.**

	15.11 Conduct enrollment activities.	**Begin 3/1/17 through 2/28/18**	**15.11 Enrollment logs will be kept on file and available for DHSP review upon request.**
	15.12 Develop a post exam for the end-user trainee on the course content to determine if additional training is needed. - If needed, re-scheduling of training must be provided. - Provide a certification of completion for trainees who pass the post exam and include a letter recommending a follow-up training every six months.	**Begin 3/1/17 through 2/28/18**	**15.12 Incorporate post exam to determine effectiveness of training. Effectiveness documentation, post exams and certifications will be kept on file and available for DHSP review upon request.**
	15.13 Distribute DHSP's class evaluation, which should be completed by the end-user that attends the class.	**Begin 3/1/17 through 2/28/18**	**15.13 Class evaluations will be submitted to DHSP**

1.0 Provide Systems License Services	1.1 Provide Casewatch Millennium ® System Software Licenses as required by DHSP. License distribution must be approved by DHSP prior to delivery.	Begin 3/1/18 through 2/28/19	1.1 DHSP monthly report.
	1.2 Deliver, Install and Upgrade, when applicable, the most current version of the Casewatch Millennium® software for each License distributed.	Begin 3/1/18 through 2/28/19	1.2 DHSP monthly report.
	1.3 Conduct License Management activities. - Ensure the number of Licenses distributed coincide with the software deployed. - Ensure Licenses are assigned only when authorized by DHSP. - Ensure all unapproved or unauthorized instances of software are reported to DHSP. - Uninstall and redistribute Licenses that are not utilized for six (6) months or longer. - Track each License distributed. - Report over and under licensing to DHSP.	Begin 3/1/18 through 2/28/19	1.3 License management activity documentation will be kept on file and available for DHSP review upon request.
	1.4 Develop and maintain a software license registry and inventory for the Casewatch Millennium®. - Product edition - Product version - Product release date	Begin 3/1/18 through 2/28/19	1.4 License registry and inventory documentation will be kept on file and available for DHSP review upon request.

	- Product description		
	1.5 Document License Distribution. - User Name - Location, telephone - Issued Date - Type of user	**Begin 3/1/18 through 2/28/19**	**1.5 License documentation will be kept on file and available for DHSP review upon request.**
2.0 Provide Data Administration Services	**2.1 Provide data administration services as follows, but not limited to:**	**Begin 3/1/18 through 2/28/19**	**2.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.**
2A.0 Database Administration	**2A.1 Perform all the Database Administration functions for Casewatch.**	**Begin 3/1/18 through 2/28/19**	**2A.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.**
	2A.2 Implement data standardization as indicated by DHSP.	**Begin 3/1/18 through 2/28/19**	**2A.2 Data standardization documentation will be kept on file and available for DHSP review upon request.**
	2A.3 Implement and manage data tune-ups and other DBA tasks. - Perform database tune-ups and synchronization regularly and on schedule.	**Begin 3/1/18 through 2/28/19**	**2A.3 Data synchronization documentation will be kept on file and available for DHSP review upon request.**

	- Create/modify Caché database user accounts. - Record all Cache database modifications and events in log. - Restart the Caché database immediately. Casewatch must be up and running within one hour after crashes or power failures. - Upgrade Caché database regularly and as required.		
2B.0 Database Security	**2B.1 Manage all aspects of database security including, but not limited to:** - Ensure only approved users have access to application system functions and "data" for which they are authorized. - Secure the database from intrusion by hackers. System should generate a message following an attempted security break. - Secure the database "data" from mistakes made by ACMS' development staff, maintenance staff, and production database administrator/s. - Secure the database from all sources of invalid "data" including records imported from the Electronic Data Interchange (EDI) modules and/or other servers, and "data" from other	**Begin 3/1/18 through 2/28/19**	**2B.1 User, logging activities, system rights, intrusion, error logs and data validation reports will be kept on file and available for DHSP review upon request.**

	ACMS or DHSP application software. - Secure all data and information provided or processed through or on Casewatch, its various functions/modules, all interfaces (to or from). This has to be (at a minimum) to the specifications required by Governmental Authorities and applicable law.		
	2B.2 Provide and maintain secure login procedures including the following: - Intruder Detection – incorrect login attempts. - Password Restrictions – minimum password length, forced periodic changes, unique passwords and limited grace logons.	**Begin 3/1/18 through 2/28/19**	**2B.2 Security logs will be kept on file and available for DHSP review upon request.**
	2B.3 Develop and Implement Security Access Control Groups in Casewatch Millennium®. - Security access control group must ensure that authenticated users have access to the functionality and information that they required and are authorized to and no more.	**Begin 3/1/18 through 2/28/19**	**2B.3 Security Access Control Group documentation will be submitted to DHSP.**
2C.0 Database Maintenance	**2C.1 Monitor the database performance.** - Perform active monitoring and tracking of database performance, disk size allocation, and overall system (application and database) responsiveness.	**Begin 3/1/18 through 2/28/19**	**2C.1 Upgrades and performance documentation will be kept on file and available for DHSP review upon request.**

	- Install DBMS upgrades and manage all changes to the database.		
2D.0 Database Backup and Recovery	**2D.1 Perform Database Backup and Recovery as indicated by DHSP.** - Perform system Backup and Recovery of the Casewatch database and application software. This has to be performed with a documented, tested, and automated method/s and tool/s to ensure fastest recovery and integrity of both the database and the application. - Implement procedures to restore the database by having several ways of recovering the database information. - Implement a disaster recovery plan in coordination with DHSP allowing no more than one hour of system downtime.	**Begin 3/1/18 through 2/28/19**	**2D.1 Database recovery plan documentation will be submitted to DHSP. If revisions are made to the recovery plan, such revised portion of the plan must be submitted to DHSP.**
2E.0 Data Encryption	**2E.1 Implement and maintain data encryption implementation in Casewatch.** - At the point where sensitive data first enters the application. - As the data are transmitted between user and the server, EDI processing, and Shadow server. - Where the Casewatch data are stored on a server and database.	**Begin 3/1/18 through 2/28/19**	**2E.1 Encryption methodology will be submitted to DHSP.**

	- Where application data are managed, such as via backup facilities.		
2F.0 Data Conversion and Migration	**2F.1 Provide data conversion and migration services as follows, but not limited to:**	**Begin 3/1/18 through 2/28/19**	**2F.1 Data conversion and migration services will be reported to DHSP.**
	2F.2 Data Extraction	**Begin 3/1/18 through 2/28/19**	**2F.2 Data will be extracted and submitted in an agreed structured format to DHSP.**
	- Process data **extraction** for each of the internal repository sources in the Casewatch Millennium® system.		
	- Provide output files of information containing agreed data components in an agreed structured format (e.g. text delimited, Excel) generated according to an agreed running schedule.		
	2F.3 Data Transport	**Begin 3/1/18 through 2/28/19**	**2F.3 Extracted data will be transported via a storage medium and submitted to DHSP.**
	- Transport **extracted** data in a specify form from the source system, Casewatch to DHSP or specify entity for processing, via a temporary storage medium.		
3.0 Provide Database Design and Modification Services	**3.1 Provide Database Flexibility**	**Begin 3/1/18 through 2/28/19**	**3.1 Database flexibility documentation will be kept on file and available for DHSP review upon request.**
	- Provide the ability for the database and the application system to accommodate all future growth in capacity and capability as new additional requirements come.		

	- Ensure Casewatch database and the application system modules are flexible and easy to use. - Provide high level of flexibility to the Casewatch form, reports, and process flow.		
3.2 Modify Database Designs - Ensure that the Database modification processes (Add, Delete, or Modify schema) of databases, tables, data sets, and fields is performed without any service interruptions and with relative ease. - Ensure the accuracy of "data" values whenever database modifications are performed. - Provide database model (subschema) and documentations of changes whenever database modifications are performed. - Establish database relationships or methods to ensure database integrity and facilitate future data mining and reporting tools.	**Begin 3/1/18 through 2/28/19**	**3.2 Database design documentation will be kept on file and available for DHSP review upon request.**
3.3 Implement and Maintain Data Integrity - Ensure that the integrity of "data" must be guaranteed and documented with an up to date Database design diagram at all times.	**Begin 3/1/18 through 2/28/19**	**3.3 Data integrity documentation and reports will be kept on file and available for DHSP review upon request.**

	- Implement database constraints to enforce new business rules once they are identified by DHSP - Ensure the accuracy of "data" values whenever data modifications are performed.		
4.0 Provide Reporting Services	**4.1 Provide User Friendly reporting function and effective report layouts as indicated by DHSP.** - All reports are to provide the specified information, and are understandable, legible, and generated and submitted in a 24 hour period.	**Begin 3/1/18 through 2/28/19**	**4.1 Letter(s) of DHSP approval and reports will be kept on file.**
	4.2 Make reports available for every data element collected in the system.	**Begin 3/1/18 through 2/28/19**	**4.2 Run any report on any given time based on the data collected from Casewatch.**
	4.3 Provide the ability for users to view and print reports via local or network printer.	**Begin 3/1/18 through 2/28/19**	**4.3 Print reports via local or network printer at any given time.**
4A.0 Standard Reports	**4A.1 Prepare and provide DHSP with access to Standard Casewatch Reports on such dates or at such time intervals and in such format as indicated by DHSP.**	**Begin 3/1/18 through 2/28/19**	**4A.1 Run Standard reports at any given time.**
	4A.2 Remain current at all times on reporting expectations for HRSA, CDC, State-OA, and DHSP.	**Begin 3/1/18 through 2/28/19**	**4A.2 Run HRSA, CDC, and State-OA reports.**

	4A.3 Provide aggregate, comparable, demographic and geographic reports and make accessible and available at any given time.	**Begin 3/1/18 through 2/28/19**	**4A.3** Run any given aggregate, comparable, demographic, and geographic report at any given time.
	4A.4 Provide very detailed Clients and services level reports and make accessible and available at any given time.	**Begin 3/1/18 through 2/28/19**	**4A.4** Run any given aggregate, comparable, demographic, and geographic report at any given time.
4B.0 Ad Hoc Reports	**4B.1** Provide Ad Hoc reporting capability through a user-friendly graphical interface.	**Begin 3/1/18 through 2/28/19**	**4B.1** Run Ad Hoc reports through the user-friendly graphical interface on a daily, weekly, or monthly basis.
	4B.2 Provide canned reports and make available from a menu. - Provide the ability to filter the data on each report.	**Begin 3/1/18 through 2/28/19**	**4B.2** Run canned reports from the given menu with the applicable filtering on a daily, weekly, or monthly basis.
4C.O Implement and maintain a Centralized Reporting Graphical User Interface	**4C.1** Implement a centralized user-friendly graphical interface that gives the user the full flexibility of the system and the capability to run all reports under one screen, form or menu. - Make available any section specific and/or related field for query. - Provide the ability to sort data by multiple fields.	**Begin 3/1/18 through 2/28/19**	**4C.1** Review and test the centralized user-friendly graphical interface in the server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.

	- Provide the ability to get full print control functions such as, print preview, pagination and layout controls.		
4D.0 Implement Filtering Parameters to the Centralized Reporting GUI	**4D.1 Maintain field parameters up-to-date on to the centralized reporting GUI for the following data fields, but not limited to:**	**Begin 3/1/18 through 2/28/19**	**4D.1 Review and test the parameter selection on user-friendly graphical interface in the report server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.**
	- Date, Month, Year parameters selection. - Provider and Site parameter selection - SPA parameter selection - Services Category, Sub Category, and Service, - Ethnicity, Age, and Gender parameter selection - Contract Number		
4E.0 Shadow Server	**4E.1 Provide shadow server maintenance.**	**Begin 3/1/18 through 2/28/19**	**4E.1 Test shadow server by running various reports and viewing information.**
	- Shadow server is to be the exact replica and serve as the full back-up of the Casewatch Millennium®.		
	- Keep server's data up-to-date by replicating Casewatch's data onto the shadow server on a daily basis.		
	- Provide the ability for the shadow server to accommodate all future growth in capacity and capability as new additional requirements are identified.		
	- Shadow server is to be the exact replica of the Casewatch Millennium®.		
5.0 Data Extraction Requirements			

		5.1	Data extraction requirements for DHSP, State-OA, CDC, and HRSA.	Begin 3/1/18 through 2/28/19	5.1 Data set log will be kept on file and available for DHSP to review upon request.
		5.2	Provide in a predefine format all the data, including historical and archive data, collected in the Casewatch Millennium® and preceding application systems to DHSP electronically via a method indicated by DHSP.	Begin 3/1/18 through 2/28/19	5.2 Data set log will be kept on file and available for DHSP to review upon request.
			- All data must be exported as requested by DHSP.		
6.0	Provide Application System Modification and Programming Services	6.1	Provide system application modification as needed or as requested by DHSP not to exceed 1,600 programming hours for the term (programming hour cap applies to 6.0, 6.1 and 6.2 together).	Begin 3/1/18 through 2/28/19	6.1 DHSP monthly status report.
			- Provision for Casewatch changes requested by DHSP, in order to collect data more efficiently.		
		6.2	Provide programming support.	Begin 3/1/18 through 2/28/19	6.2 DHSP monthly status report.
			- Perform Bug fixes and enhancements.		
		6.3	Provide programs modification for the Casewatch's Electronic Data Interface (EDI) module for new agencies as requested by DHSP.	Begin 3/1/18 through 2/28/19	6.3 EDI modification documentation will be kept on file and available for DHSP review upon request.
7.0	Provide on-going Electronic Data Interchange				

(EDI) services to Care System providers.	7.1	**Support the use of Electronic Data Interchange (EDI) to Care Services providers as indicated by DHSP.** - Support all inbound/outbound EDI transactions, data standards, code sets and industry standards and extension such as, but not limited to CPT4.	**Begin 3/1/18 through 2/28/19**	7.1 **DHSP monthly status report.**
	7.2	**Perform data validation and apply methods and rules to ensure data quality in the EDI module.**	**Begin 3/1/18 through 2/28/19**	7.2 **System documentation and logs will be kept on file and available for DHSP review upon request.**
	7.3	**Make available all data imported by the EDI module in all Casewatch modules and functions, including, but not limited to:** - Add, Delete, Modify/Editing and reporting	**Begin 3/1/18 through 2/28/19**	7.3 **Monthly Electronic generated Casewatch report.**
	7.4	**Provide the feature to perform interface data maintenances for all Casewatch EDI transmitted data:-** - Adding, Deleting, Modifying and View/Print.	**Begin 3/1/18 through 2/28/19**	7.4 **Maintenance logs will be kept on file and available for DHSP review upon request.**
	7.5	**Installation of new Electronic Data Interchange (EDI) module must be approved by DHSP prior to initiating work.**	**Begin 3/1/18 through 2/28/19**	7.5 **Letter(s) of DHSP approval and materials will be kept on file.**
8.0 Quality Assurance & Utilization Review of Care Services	8.1	**Collaborate with DHSP to maintain a quality assurance system to monitor the quality of**	**Begin 3/1/18 through 2/28/19**	8.1 **Letter(s) of DHSP approval and materials will be kept on file.**

	Care Services.		
	- Compile data using sampling techniques, statistical analysis and computer resources.		
	- Assist DHSP to analyze and interpret data to determine quality of patient care and to identify problems, patterns, and high-risk activities.		
	- Assist DHSP to disseminates data and results of studies; develop and maintain clinical and administrative records and reporting systems.		
8A.0 Casewatch Data Quality Assurance	**8A.1 Collaborate with DHSP Data Management to maintain and support Data Quality Assurance tasks.**	**Begin 3/1/18 through 2/28/19**	**8A.1 Letter(s) of DHSP approval and materials will be kept on file.**
	- Collaborate with DHSP in identifying and developing data standards, validation rules, database constraints, and business rules.		
	- Maintain system, module, function, and form level data entry validation rules, database constraints, business rules, and data standards.		
	- The implementation of database and application system validations, database constraints, and business rules must enable rejection of all types of data that don't conform to these rules.		

	- Additionally utilize Data Entry/Maintenance Reports "Error Report" to print data with discrepancies, errors, and problems from a temporary file.		
9.0 Provide Regular System Updates	**9.1 Provide application system software updates as needed to all HIV Care Services providers and DHSP.**	**Begin 3/1/18 through 2/28/19**	**9.1 DHSP monthly status report.**
	9.2 Install and configure the server software updates and the client software updates to all Providers. ACMS will then train the IT personnel assigned to the project for ongoing client software installations	**Begin 3/1/18 through 2/28/19**	**9.2 DHSP monthly status report.**
10.0 Provide Application System Support	**10.1 Provide system configuration, installation, and set up support for Casewatch users.**	**Begin 3/1/18 through 2/28/19**	**10.1 DHSP monthly status report.**
	10.2 Provide maintenance for all the Casewatch modules including the following functions:	**Begin 3/1/18 through 2/28/19**	**10.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request.**
	- Adding, Deleting, Modifying, and Programming		
10A.0 Provide Application Systems Administration	**10A.1 Provide application development support to keep the application operating in a changing business & technical environment.**	**Begin 3/1/18 through 2/28/19**	**10A.1 DHSP monthly status report. System maintenance and modification, user, and event logs will be kept on file and available for DHSP review upon request.**
	- Create/modify Casewatch Application System user accounts.		
	- Record all Application System/Modules		

	modifications and events in log. - Restart the Application System within one hour after panics, crashes, or power failures. - Upgrade Casewatch Application System regularly and as required.		
11.0 Provide End-User Support	**11.1 Casewatch end user support includes, but not limited to:** - Provide on-going telephone customer support and help desk coverage. - Return phone calls within thirty minutes. - Provide help desk support and coordinate resolution when a problem arises with the system. - Employ a help-desk system as a tool for managing duties, communicating issues and to generate daily, weekly and monthly log reports. - Implement a triage system for all Casewatch technology needs and inquiries from providers and DHSP. - Provide services from 8:00 A.M. and 5:00 P.M., Monday through Friday, Pacific Time, excluding Los Angeles County legal holidays.	**Begin 3/1/18 through 2/28/19**	**11.1 DHSP monthly status report.**
	11.1.a Resolve Casewatch user problems for all	**Begin 3/1/18**	**11.1a Support log will be kept on**

	related modules.	**through 2/28/19**	**file and available for DHSP review upon request.**
	11.2 Provide Software support - Install, configure, and setup the Casewatch application, including the installation and updating of drivers and other files necessary to allow the application to work properly on all users' computers. These activities apply to all providers and DHSP on an ongoing-basis.	**Begin 3/1/18 through 2/28/19**	**11.2 DHSP monthly status report.**
12.0 Provide Implementation Services	**12.1 Migrate new providers to Casewatch.**	**Begin 3/1/18 through 2/28/19**	**12.1 DHSP monthly status report.**
	12.2 Submit Implementation Plan Submit a written implementation plan showing: - List of tasks - Task duration - Milestones - Resource levels and allocation - Resource levels and allocation ACMS must submit a written plan explaining any possible constraints or deviations to the submitted plan.	**Begin 3/1/18 through 2/28/19**	**12.2 Implementation Plan will be submitted to DHSP for approval.**
	12.3 Install and configure the server software and the client software to all Providers and train the IT personnel assigned to the project for ongoing client software installations.	**Begin 3/1/18 through 2/28/19**	**12.3 Implementation Plan will be submitted to DHSP.**

13.0 System Documentation			
	13.1 Provide Casewatch Millennium® Manuals.	**Begin 3/1/18 through 2/28/19**	**13.1 Manuals will be submitted to DHSP.**
	13.2 Provide User Manual - User Manual must be updated annually or as requested by DHSP. - Determine the effectiveness of the user manual by documenting feedback from users.	**Begin 3/1/18 through 2/28/19**	**13.2 User Manual will be annually submitted to DHSP.**
	13.3 Provide Administration and Operations Manual - Manuals must be updated annually or as requested by DHSP.	**Begin 3/1/18 through 2/28/19**	**13.3 Administration and Operations Manuals will be annually submitted to DHSP.**
	13.4 Maintain an up-to-date Casewatch's dictionary's data element documentation for all service modules as follows: - Data Element Name - Description - Screen location including a screenshot - Physical Attributes - Validation Rules and Business Rules associated with the data element - Default Values	**Begin 3/1/18 through 2/28/19**	**13.4 Data element documentation will be kept on file kept and available for DHSP review upon request.**

	13.5 Maintain an up-to-date documentation on how the Casewatch's Electronic Data Interface (EDI) module software provides data validation.	Begin 3/1/18 through 2/28/19	13.5 EDI's data validation documents will be kept on file and available for DHSP review upon request.
	13.6 Maintain an up-to-date documentation on the methodologies, algorithms, and business rules utilized by the Casewatch's Electronic Data Interface (EDI) module.	Begin 3/1/18 through 2/28/19	13.6 Methodologies, algorithms, and business rules documentation will be kept on file and available for DHSP review upon request.
14.0 Data Dictionary Maintenance	14.1 Create, update and maintain system dictionaries and tables, including service provider specific fee schedules.	Begin 3/1/18 through 2/28/19	14.1 Logs will be kept on file and available for DHSP review upon request.
	14.2 Provide maintenance of all Casewatch dictionaries including, but not limited to: - Adding, Deleting, Modifying, & Programming	Begin 3/1/18 through 2/28/19	14.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request.
15.0 Provide Training Services	15.1 Provide hands-on technical software training to DHSP personnel as needed or as requested by DHSP.	Begin 3/1/18 through 2/28/19	15.1 DHSP monthly status report.
	15.2 Provide classroom and hands-on Casewatch application training to provider's end-users and DHSP staff.	Begin 3/1/18 through 2/28/19	15.2 Classroom location and capacity report will be submitted to DHSP.
	15.3 Provide up to date training materials to all attendees.	Begin 3/1/18 through 2/28/19	15.3 Training materials will be submitted to DHSP.

	- Material must be updated annually or as requested by DHSP.		
	15.4 Provide a "Train the Trainer" curriculum with training materials.	Begin 3/1/18 through 2/28/19	15.4 Curriculum will be submitted to DHSP.
	15.5 Provide a training curriculum to be approved by DHSP in writing fifteen (15) days prior to training.	Begin 3/1/18 through 2/28/19	15.5 Training curriculum will be submitted to DHSP for approval.
	15.6 Submit a list of available training sessions with content overview.	Begin 3/1/18 through 2/28/19	15.6 Training schedule will be submitted to DHSP.
	15.7 Submit a training plan for both providers and DHSP personnel.	Begin 3/1/18 through 2/28/19	15.7 Training plan will be submitted to DHSP.
	15.8 Submit examples of the existing training material.	Begin 3/1/18 through 2/28/19	15.8 Existing material will be submitted to DHSP.
	15.9 Create monthly training schedule. (Classes will be offered weekly for each service category.)	Begin 3/1/18 through 2/28/19	15.9 Monthly schedule will be submitted to DHSP.
	15.10 Distribute class schedule to all providers and DHSP staff at least one month prior to the training.	Begin 3/1/18 through 2/28/19	15.10 Monthly schedule will be submitted to DHSP one month prior to the training.

	15.11 **Conduct enrollment activities.**	**Begin 3/1/18 through 2/28/19**	**15.11** **Enrollment logs will be kept on file and available for DHSP review upon request.**

	15.12 **Develop a post exam for the end-user trainee on the course content to determine if additional training is needed.**
	
	  - If needed, re-scheduling of training must be provided.
	
	  - Provide a certification of completion for trainees who pass the post exam and include a letter recommending a follow-up training every six months.
		Begin 3/1/18 through 2/28/19	**15.12** **Incorporate post exam to determine effectiveness of training. Effectiveness documentation, post exams and certifications will be kept on file and available for DHSP review upon request.**

	15.13 **Distribute DHSP's class evaluation, which should be completed by the end-user that attends the class.**	**Begin 3/1/18 through 2/28/19**	**15.13** **Class evaluations will be submitted to DHSP.**